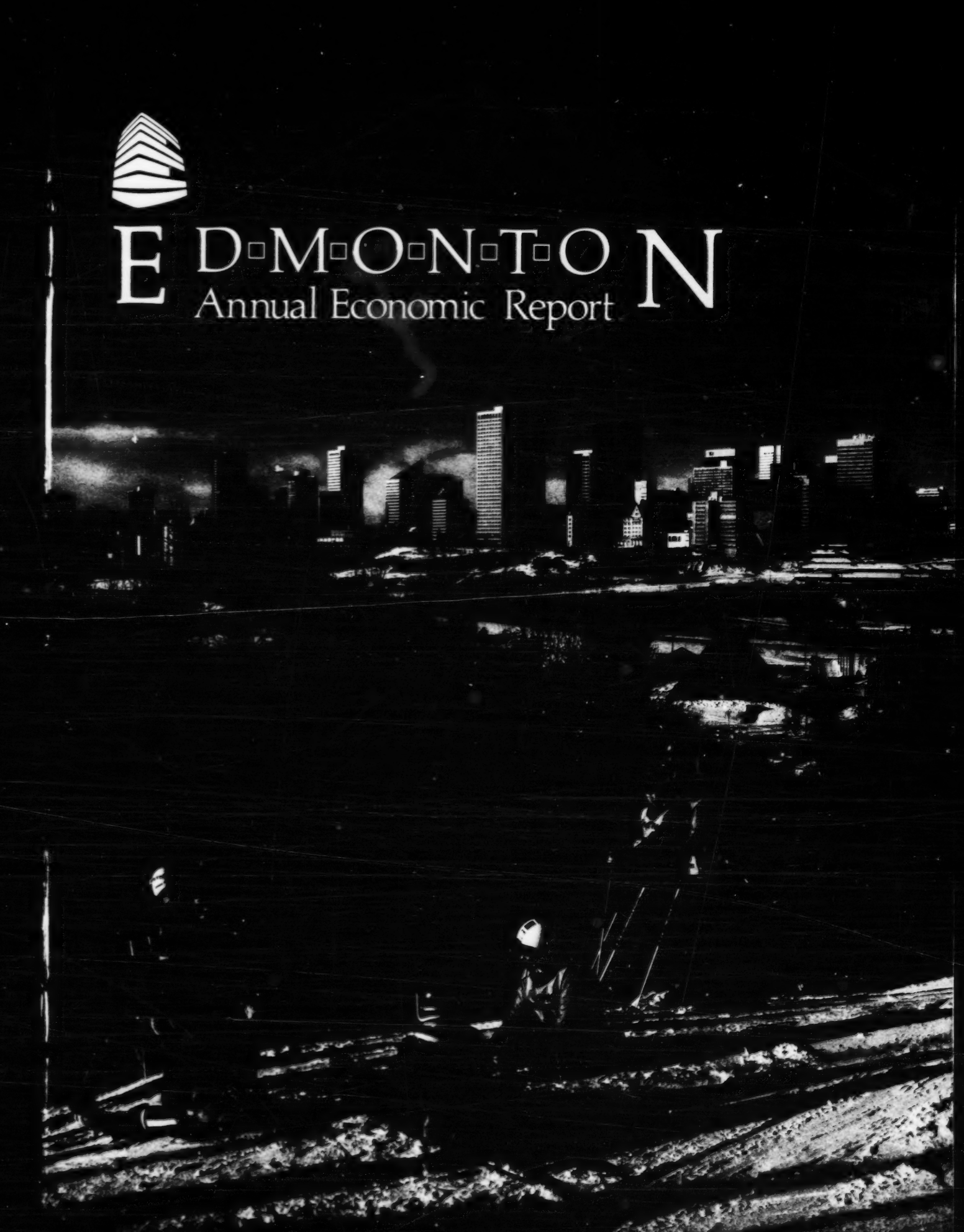
EDMONTON

Annual Economic Report



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Cover

Skiing five minutes from downtown is just one of the many advantages of living in Edmonton.

EDMONTON ECONOMIC DEVELOPMENT AUTHORITY

The Edmonton Economic Development Authority has been established to promote and develop the Edmonton economy. The Authority's goal is to achieve a diversified and stable economic base for Edmonton. It is responsible for the initiation of economic development programs that support local industry as well as attract new economic growth.

Edmonton is the capital of Alberta and the province's largest metropolitan centre.

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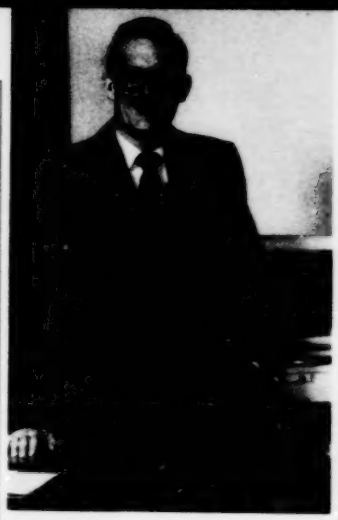


R.B. Snyder.

CHAIRMAN'S MESSAGE

As Chairman of the Edmonton Economic Development Authority, I am pleased to submit the 1986 Edmonton Annual Economic Report.

Edmonton's growing and diversified economy exhibited considerable new growth in 1986 despite the world's oil industry experiencing its recent dramatic drop in oil prices.

Currently, there is more private sector construction under way in downtown Edmonton than in any of the previous five years. More than $500 million in commercial and retail developments are in progress. These include: Eaton Centre, Manulife II, Jasper Galleria and the Kingsway Garden Mall expansion. Also announced for a 1987 construction start in Edmonton's central business district is the Olympia and York office/retail development and the Edmonton Centre expansion.

Other construction projects in progress include the federal government's $205 million Canada Place, the City's $130 million addition to the light rail transit system, the new $80 million Millwoods Hospital and the $100 million Millwoods Town Centre shopping complex.

Expenditure on retail goods and services were valued at $6.8 billion for 1986, a growth of 12.4% over 1985. This Edmonton business sector exhibited the fourth highest activity level among Canadian cities.

Edmonton's business community, like that of most other Canadian cities, is largely made up of small businesses. This business sector will continue to experience substantial economic growth providing new jobs and a variety of business and investment opportunities.

The city's rapidly expanding advanced technology community is an example of this new economic growth. Nineteen eighty-six saw more development in advanced technology industries than in the previous decade. This has resulted in Edmonton emerging as one of North America's new and progressive advanced technology centres.

Edmonton's continuing role as the major distribution and manufacturing centre in Western Canada offers many opportunities to expand or locate new business in the Edmonton region.

Our city's rich cultural heritage, beautiful river valley, varied cultural activities and sports facilities provide an exceptional quality of life.

The Edmonton Economic Development Authority's role is to assist business and industry in their examination of Edmonton's economic climate. Metro Edmonton has an impressive list of economic locational advantages to offer. The Authority is ready to work with individuals and companies, in confidence, providing information concerning Edmonton and our marketing area. If we can be of further service to you, write or give us a call.

R.B. (Bob) Snyder
Chairman

May, 1987

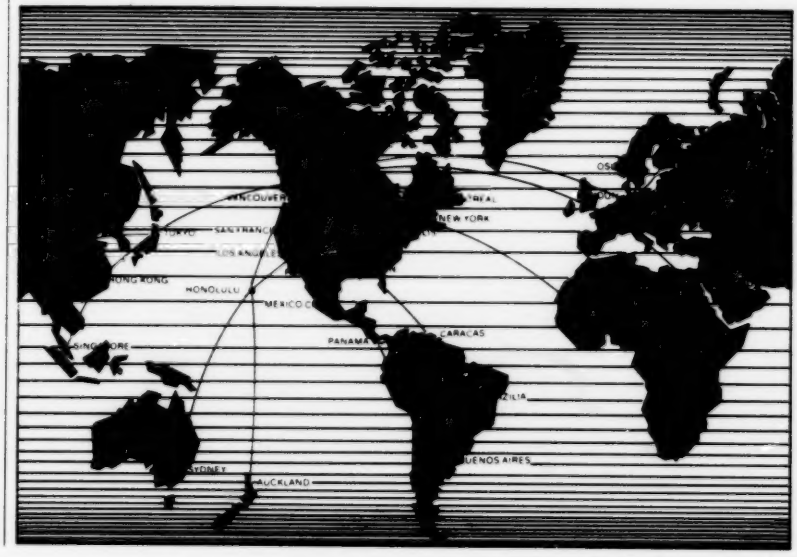
Edmonton's economic development opportunities are complemented by an exceptional quality of life environment.

LOCATION

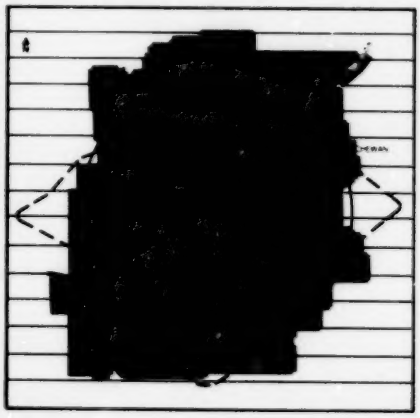
Edmonton is located at the geographic centre of Alberta and western Canada. This strategic position gives the city many advantages as a major corporate, manufacturing and distribution hub in the West.

Edmonton is the focal point of extensive oil, gas and other resource industries. The city's service area extends from central and northern Alberta to the Northwest Territories, northern British Columbia and northwestern Saskatchewan.

Map 1
Edmonton in the World



Map 2
Metro Edmonton Region



Metro Edmonton Region
- Metro Edmonton (Edmonton Sub Region)
- Edmonton Proper
- County and Municipal District Boundaries
- 48 kilometres (30 miles) radius
- 45 minutes travel time from downtown Edmonton

Over 80% of Alberta's producing oil wells are located in the Edmonton market area.

Over 85% of the province's petroleum products are processed in Edmonton.

NATURAL RESOURCES

Resource development is the mainstay of Edmonton's and western Canada's economy. Vast resource wealth and growing domestic and international markets nurture this development.

Conventional Oil and Gas

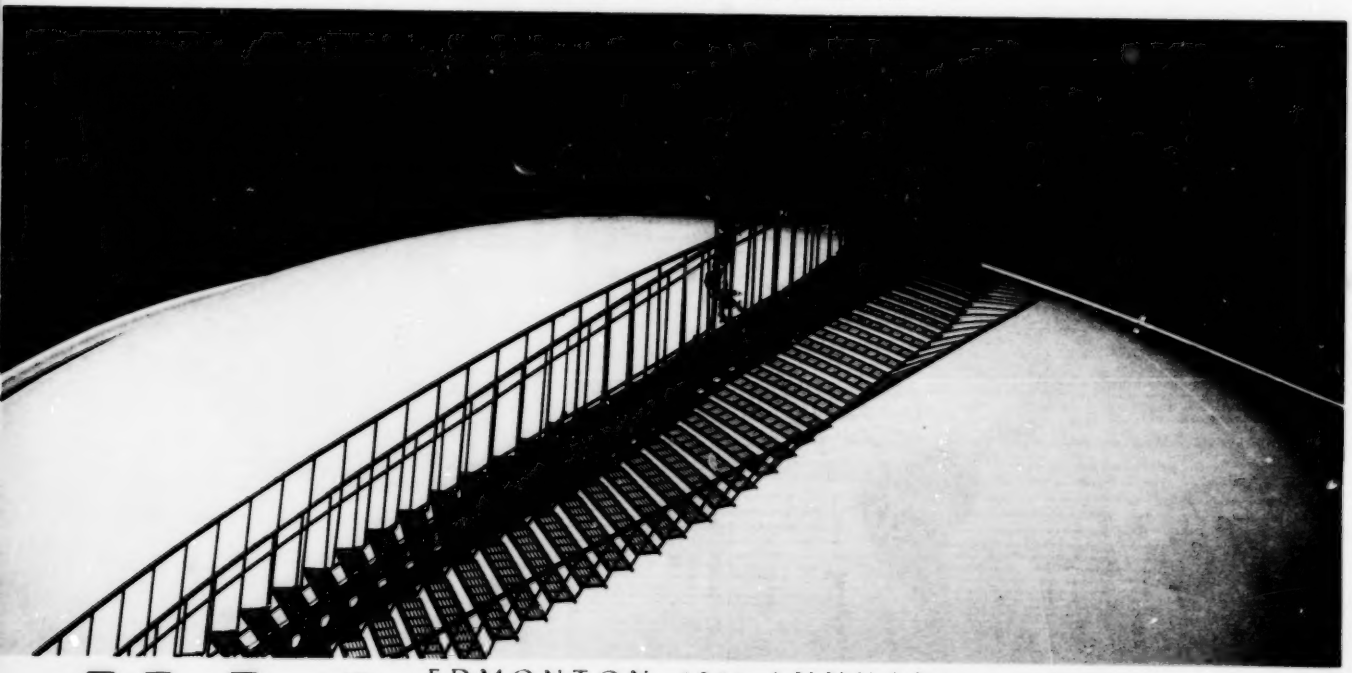
Edmonton's importance to western Canada's oil and gas industry is illustrated by the fact that over 80% of Canada's oil reserves are in Alberta and over 80% of the producing oil wells in the province are in the Edmonton market area.

Conventional crude oil reserves in Alberta at year-end 1986 were 635 million cubic metres (4 billion barrels). Established reserves of marketable natural gas were 1.72 trillion cubic metres (61 trillion cubic feet). Gross revenues from oil and gas production during 1986 totalled $14.2 billion.

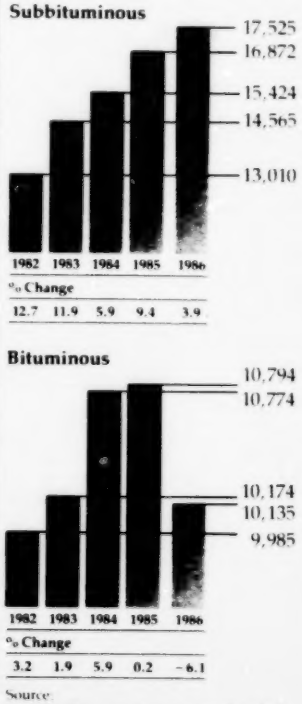
Table 1
Petroleum Industry Expenditures 1982 – 1986
($ millions)

Alberta	1982	1983	1984	1985	**1986***
Exploration	1,401.4	1,390.1	1,602.6	1,848.8	1,239.2
Development	942.5	906.3	996.9	1,296.1	742.0
Land	465.6	565.1	790.2	1,021.1	391.4
Producing Facilities	972.0	715.4	958.6	1,320.5	925.1
Producing Costs	1,992.3	2,227.1	2,665.5	3,280.9	3,448.8
Gas Plants	493.7	179.7	180.5	263.3	180.0
Royalties [a]	5,098.1	5,467.2	5,958.1	6,005.4	3,779.5
Other [b]	193.0	204.7	206.9	**	**
Total	11,558.6	11,655.6	13,359.3	15,036.1	10,706.0

* **Oilweek** estimate
** Effective 1985 all taxes except income taxes included in "Producing Costs".
Note: (a) Includes mineral tax and other charges (b) Excludes interest expense 1982-1986
Source: **Oilweek,** Annual Review and Forecast - 1987



Graph 1
Alberta Coal Production
1982 - 1986
(thousands of tonnes)



Source:
Energy Resources Conservation Board – Alberta's Coal Industry – Annual Statistics 1986

Oil Sands

Edmonton is the major service and distribution centre for the Alberta oil sands, which are among the largest deposits in the world. The area contains an estimated 265.5 billion cubic metres (1.6 trillion barrels) of in-place reserves.

Two oil sands extraction and processing plants currently operate in the Athabasca deposit near Fort McMurray using surface mining techniques. These plants have a designed daily production capacity of nearly 28,000 cubic metres (175,000 barrels) of high grade synthetic crude oil. Over $4.8 billion of upgrading and expansion expenditures are planned for these plants through 1991.

Numerous other major oil companies and consortiums are actively pursuing oil sands projects ranging from pilot plants and experimental projects to large-scale commercial developments. These include BP Exploration's Wolf Lake in situ oil sands project, Esso Resources Canada's 10 phase Cold Lake in situ oil sands recovery program and Husky Oil's Lloydminster heavy oil recovery and upgrader development.

In addition, four other commercial operations are in the construction stage or near commissioning. These include projects being undertaken by Shell Canada, Suncor, Dome and Amoco.

Coal

Approximately 70% of the recoverable coal reserves in Canada are situated in Alberta, with the majority of them in close proximity to Edmonton. In-place reserves total more than 51 billion tonnes. Eighteen billion tonnes are recoverable using existing technology.

In 1986, subbituminous (thermal) coal production totalled 17.5 million tonnes. Bituminous (metallurgical) coal production reached 10.1 million tonnes. Coal exports in 1986 included 1.4 million tonnes to other provinces and more than 5.6 million tonnes to other countries.

Electrical utilities in Alberta are switching to coal from natural gas to fuel their largest power generating plants. Electric energy generation, coupled with the growing demands of Pacific Rim countries for metallurgical coal, assures long-term growth for the development of this natural resource.

Recently, approval has been granted for the Genesee Thermal Power plant near Edmonton. The $1.5 billion plant will bring 400 megawatts into the Alberta power grid in 1989. Phase II of the project will make available an additional 400 megawatts in 1991.

A Coal Research Centre has been established on the outskirts of Edmonton. The $17 million facility houses researchers from the Albert . Research Council, the federal department of Energy, Mines and Resources and other agencies.

Agriculture

Agriculture is an important component of the Alberta economy. Farm area in the province totals more than 20.6 million hectares (51 million acres). Some 12.9 million hectares (31.9 million acres) are used in crop, livestock and other agricultural production with

Table 2
Alberta Oil Sands Expenditures 1982 – 1986 ($ millions)

	1982	1983	1984	1985	**1986***
Capital Expenditures [a]	386.1	422.6	510.3	1,131.5	600.0
Operating Costs [b]	1,051.5	1,048.2	1,064.3	1,225.6	1,100.0
Royalties	273.5	395.8	179.0	N/A	N/A
Total	1,711.1	1,866.6	1,753.6	2,357.1	1,700.0

* **Oilweek** estimate

Note: (a) Includes exploratory and delineation drilling, research and development, fixed installations, machinery and equipment, housing and pollution control equipment.
(b) Includes taxes, administration expense, land acquisition and retention, reclamation costs and other operating outlays.

Source: Canadian Petroleum Association

The Edmonton market area contains over two-thirds of the province's farms.

another 7.7 million hectares (19.1 million acres) available for future use.

Farm operations in Alberta are large and capital intensive with an average size of over 350 hectares (880 acres) and an average capital investment of almost $500,000. Alberta is one of the most productive agricultural regions in the world, making it very competitive in world markets.

Farm cash receipts for 1986 are estimated at nearly $3.8 billion. Grain crops – mainly wheat, barley and canola – account for $1.72 billion. Livestock sales and livestock products totalled $1.76 billion.

The Edmonton market area contains over two-thirds of the province's farms and the majority of Alberta's hog and poultry production. This important agricultural sector provides a base for Edmonton's third-largest manufacturing activity, the food and beverage industry.

Minerals

Edmonton has ready access to an abundant supply of minerals for construction and industrial use. Resources in the immediate vicinity of the city include industrial sand, brick clay, lightweight aggregate, limestone marl, stoneware clay, and bentonite. Plants have been established to produce cement, pottery and fibreglass products.

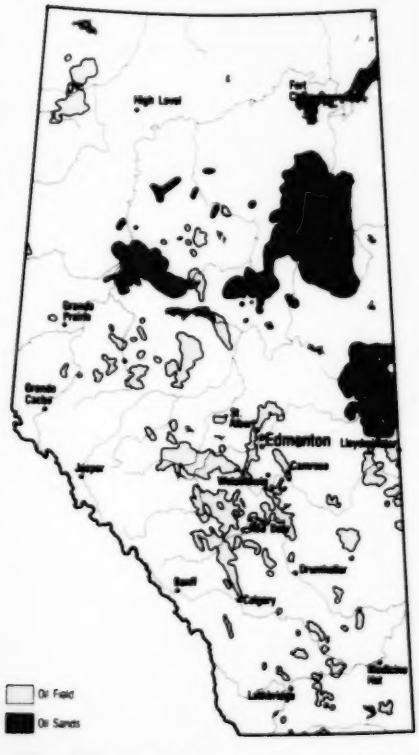
Forestry

Edmonton is the major service and distribution centre for the forest product industry. Vast forest reserves lie mainly to the north and west of the city. Alberta's lumber production is marketed mostly in eastern Canada and the United States. Only a small percentage of the potential of the Alberta forest industry has been tapped to date.

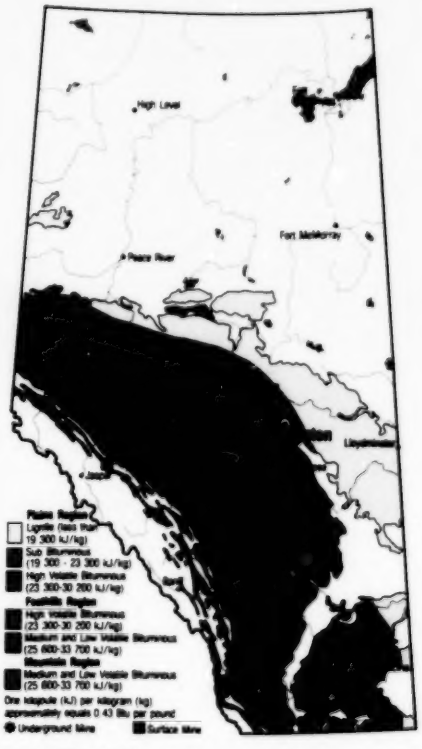
Water

More than 90% of the water flow in Alberta is in the northern part of the province, which is Edmonton's service area. The city, located on the banks of the North Saskatchewan River, provides an ample supply of high-quality water. ■

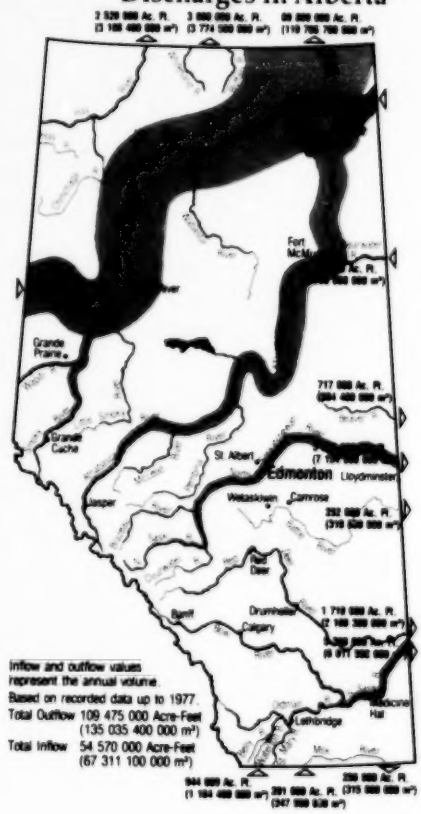
Map 3 – Oil Fields and Oil Sands in Alberta



Map 4 – Coal in Alberta

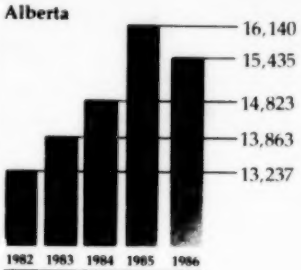

High Level
Fort McMurray
Peace River
Jasper
Drumheller
Calgary
Lethbridge
Plains Region
Lignite (less than 19 300 kJ/kg)
Sub Bituminous (19 300 - 23 300 kJ/kg)
High Volatile Bituminous (23 300-30 200 kJ/kg)
Foothills Region
High Volatile Bituminous (23 300-30 200 kJ/kg)
Medium and Low Volatile Bituminous (25 600-33 700 kJ/kg)
Mountain Region
Medium and Low Volatile Bituminous (25 600-33 700 kJ/kg)
One kilojoule (kJ) per kilogram (kg) approximately equals 0.43 Btu per pound
Underground Mine
Surface Mine

Map 5 – Mean Annual River Discharges in Alberta



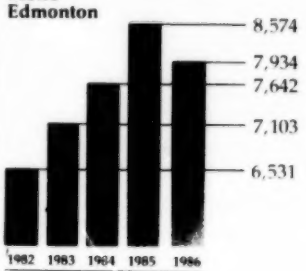
Graph 2
Value of Manufacturing Shipments 1982 – 1986
($ millions)

Alberta



	1982	1983	1984	1985	1986
% Change	N/A	4.73	6.72	8.89	-4.37

Metro* Edmonton



	1982	1983	1984	1985	1986
% Change	N/A	8.76	7.59	12.19	-7.47

In 1986, Metro Edmonton accounted for 51% of Alberta's manufacturing output.

* Edmonton Economic Development Authority estimates

Source:
Alberta Bureau of Statistics – Principal Manufacturing Statistics
Statistics Canada – Catalogue #31-001

INDUSTRY

Alberta's natural resources and Edmonton's population base offer exceptional potential for business opportunities in the Edmonton area, making it a logical location for new or expanded commercial ventures in western Canada.

Manufacturing

The economic growth potential of western Canada provides an exciting diversity of opportunity, and an increasingly affluent market for manufactured products.

In 1986, Metro Edmonton manufacturing shipments were valued at more than $7.9 billion. With more than 60 industrial parks in the area, land zoned for industrial use totals approximately 12,000 hectares (more than 30,000 acres).

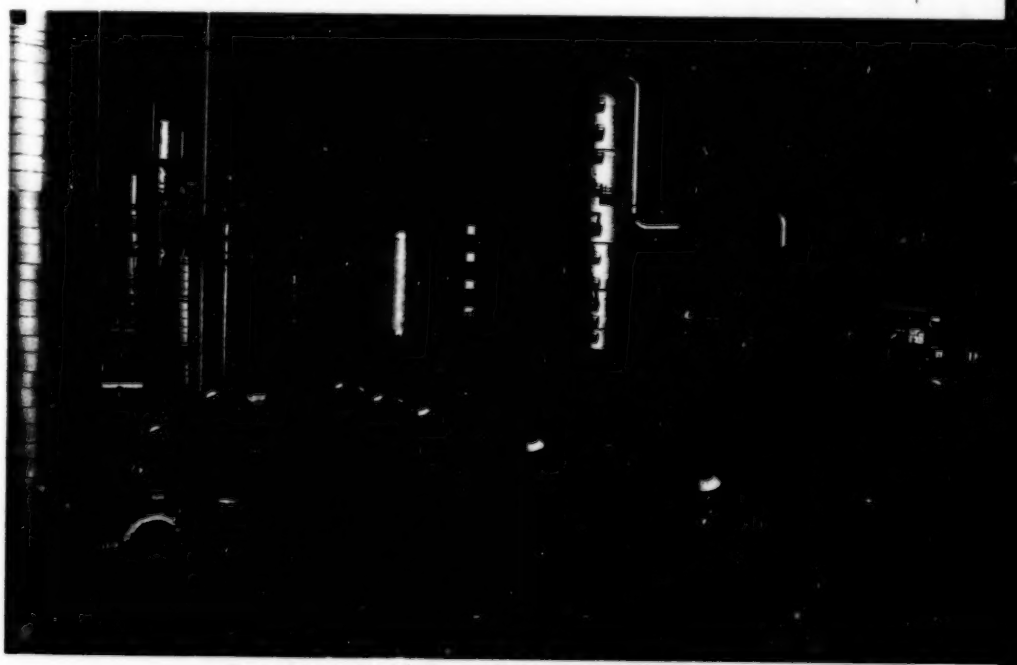
Graph 3
Metro Edmonton
Manufactured Goods By Major Sectors – 1986*
($ thousands)

	Value	% Change - 1986
Petroleum and Coal	$3,784,536	-13.02
Chemicals and Chemical Products	1,074,042	-2.58
Food and Beverage	935,674	-.79
Primary Metal	482,285	-14.09
Metal Fabricating	359,404	9.76
Printing, Publishing & Allied Industries	269,283	8.73
Machinery Industries	255,383	-12.33
Non-Metallic Mineral Products	193,122	.35
Miscellaneous and NES (a)	580,212	4.05
Total	$7,933,941	-7.47

* Edmonton Economic Development Authority estimates

Note:
(a) Miscellaneous and NES category includes: Rubber & Plastics, Leather Industries, Textile & Clothing Industries, Wood Industries, Furniture and Fixtures, Paper and Allied Industries, Transport Equipment, Electrical Products and Miscellaneous Products.

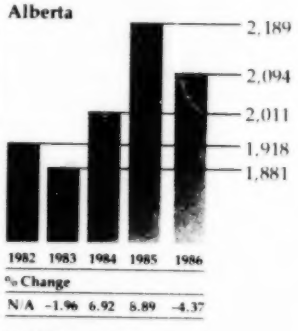
Source: Alberta Bureau of Statistics – Principal Manufacturing Statistics
Statistics Canada – Catalogue #31-203, #31-209

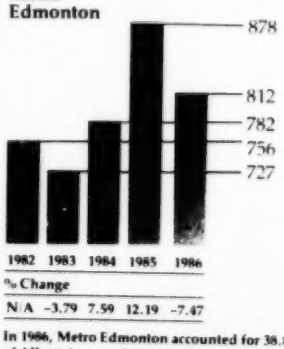


Petroleum and coal products are responsible for Edmonton's largest manufacturing sector.

Food and beverage industries make up Edmonton's third largest manufacturing sector.

Graph 4
Manufacturing Payroll
1982 – 1986
($ millions)





In 1986, Metro Edmonton accounted for 38.8% of Alberta's manufacturing payroll.

* Edmonton Economic Development Authority estimates

Source:
Alberta Bureau of Statistics - Alberta Principal Manufacturing Statistics
Statistics Canada - Catalogue #31-001

Petroleum and Coal
The petroleum and coal industries have been the prime factors in the economic growth experienced in Alberta and in particular the Metro Edmonton region. Petroleum and coal products made up Edmonton's largest manufacturing sector in 1986, accounting for over $3.7 billion in shipments. This sector represents over 47% of the metro area's total manufacturing production and includes facilities for propane, butane, pentane, and sulphur production.

Edmonton is recognized as the oil and gas production, refining and distribution centre for Canada. Over 85% of Alberta's petroleum products are processed in Metro Edmonton refineries.

Chemicals and Chemical Products
This sector produced $1 billion of shipments in 1986 and represented over 13% of Edmonton's total manufacturing shipments. Edmonton's petrochemical industry has seen world-scale development in recent years and expansion programs are planned. Based on readily available natural gas and petroleum feedstocks, the petrochemical industry has a long-term future in the Metro Edmonton area.

Food and Beverage
Food and beverage industries constitute the third largest manufacturing sector, representing 12% of Metro Edmonton's total manufacturing production. This sector will remain prominent in Edmonton with the growing Alberta and out-of-province markets.

The recently built $8.6 million Alberta Food Processing Development Centre is available to Edmonton area businesses to test new products or processing methods in a specialized environment and facility thereby not having to interrupt their own plant operation.

Primary Metal
The value of primary metal manufacturing was $482 million in 1986. Future expansion will parallel the continued development of other sectors.

Metal Fabricating
Metal fabricating has had a high growth rate over the last 20 years, particularly in support of oil and gas exploration and construction of pipelines and processing plants. Production in the metal fabricating industry was an estimated $359 million in 1986.

The Alberta Food Processing Development Centre is available to industry to develop and test new food products and processes.

Edmonton is emerging as one of North America's most progressive and diversified advanced technology centres.

Printing, Publishing and Allied Industries
These industry sectors accounted for $269 million in shipments in 1986. They continue to exhibit strong growth and will provide new investment opportunities in the future.

Machinery Industries
Meeting a demand for products such as agricultural implements, commercial, industrial, construction and mining equipment resulted in more than $255 million in shipments for machinery industries in 1986.

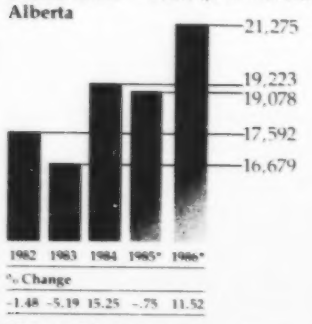
Non-Metallic Mineral Products
Over $193 million of non-metallic mineral products were manufactured in 1986, including cement, concrete, glass and other materials commonly used in construction.

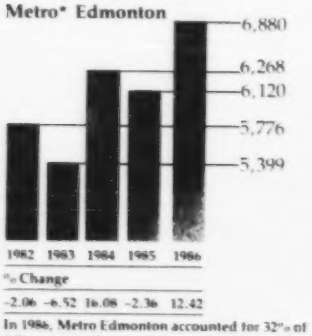
Advanced Technologies
Edmonton is emerging as one of North America's new and progressive advanced technology centres. The city has an enviable array of research institutions and facilities. Edmonton firms are involved in world class development in medical technologies, biotechnology, pharmaceuticals, specialty chemicals, lasers, electronics, instrumentation, computers, advanced materials and aerospace industries.

Edmonton-based advanced technology organizations include: the Alberta Research Council, Canada's oldest and largest provincial research facility; the University of Alberta, which operates 20 affiliated research institutes; the Alberta Oil Sands Technology and Research Authority; Syncrude; the Alberta Heritage Foundation for Medical Research; the Alberta Microelectronics Centre; Alberta Laser Institute; Electronics Test Centre; the Coal Research Centre Devon; the Centre for Frontier Engineering Research and the Alberta Food Processing Development Centre.

Edmonton is also the location of Canada's fastest growing advanced technology park, Edmonton Research Park. Under construction at this City-owned facility is the Edmonton Advanced Technology Centre designed to provide new emerging advanced technology firms with a suitable environment from which to grow. The Park is currently home to 13 organizations employing more than 700 scientists, engineers, technicians and support staff.

Graph 5
Value of Retail and Service Trade 1982 – 1986 ($ millions)



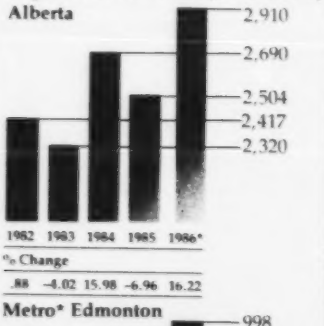


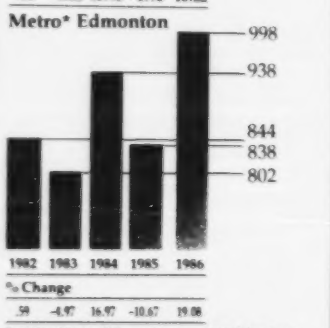
In 1986, Metro Edmonton accounted for 32% of Alberta's retail and service trade.

* Edmonton Economic Development Authority estimates

Source:
Alberta Bureau of Statistics – Alberta Retail and Service Trade Statistics
Statistics Canada – Catalogue #63-005

Graph 6
Retail and Service Trade Payroll 1982–1986 ($ millions)





In 1986, Metro Edmonton accounted for 34.3% of Alberta's retail and service trade payroll.

* Edmonton Economic Development Authority estimates

Source:
Alberta Bureau of Statistics – Alberta Retail and Service Trade Statistics
Statistics Canada – CANSIM Matrix 2313

RETAIL AND SERVICE TRADE

Boardwalk Market is just one of a number of new retail complexes that recently opened in Edmonton.

Expenditures on retail goods and services in Metro Edmonton were valued at $6.8 billion and are now fourth highest among Canadian cities. Growth of the retail and service industry in Edmonton amounted to 12.4% in 1986. The five-year average annual growth is 3.5%.

Edmonton's 17 major shopping centres have over 1.25 million sq. m (13.33 million sq. ft.) of retail space. West Edmonton Mall, with over 465,000 sq. m (5 million sq. ft.) is the city's premiere retail showcase. With over 800 stores, the mall is the world's largest indoor shopping and entertainment complex.

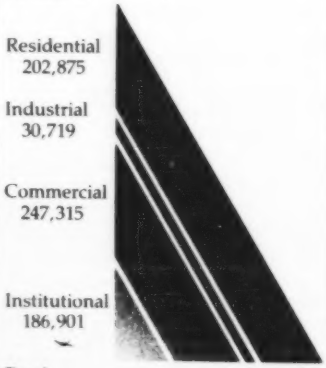
In Edmonton's downtown shopping district, the newest completed project is Boardwalk Market, a redevelopment project incorporating food and fashion boutiques. Eaton Centre, a three phase, $600 million project is quickly taking shape. The retail phase of this project is slated to open in late 1987. Other phases of this project include additional retail, hotel and residential components.

Also under construction in downtown Edmonton is the Jasper Galleria and the first phase of the Manulife II retail/office project. Jasper Galleria is a $60 million redevelopment project which involves the renovation of approximately 32,500 sq. m (350,000 sq. ft.) of existing retail space.

Manulife II is a combined retail, office, and hotel project totalling $130 million. The first three-level retail phase is currently being developed. Edmonton Centre, which has undergone major renovations in the last few years, is planning a $6 million expansion which will add an additional floor of retail space to the current development.

In a move to enhance the development of Edmonton's central business district, the Edmonton Downtown Development Corporation has been established. This organization acts as a central coordinating body for all downtown developments. ■

Graph 7
Metro Edmonton* Value of Building Permits – 1986
($ 000's)



In 1986, Metro Edmonton accounted for 36.3% of Alberta's building permits.

* Edmonton Economic Development Authority estimates

Source: Statistics Canada - Catalogue #64-203

Metro Edmonton building permits totalled almost $668 million in 1986, an increase of 11% over last year.

CONSTRUCTION

Metro Edmonton's building permits totalled almost $668 million in 1986, an increase of 11% from the previous year. In 1986, residential permits were 30% of the total, commercial 37%, industrial 5%, and institutional 28%.

Construction prospects for 1987 are positive for Edmonton with the bulk of ongoing and planned projects related to the retail sector. In addition to retail utilization of downtown, the Bay will be playing a major role in the $60 million expansion for Kingsway Garden Mall. Olympia and York Developments Ltd. recently revealed plans for a redevelopment project in the central business district. Initial plans call for a retail/office complex with capital costs in the $225 million range. One of the primary tenants for the office complex will be the Government of Alberta.

In south Edmonton, the Millwoods Town Centre will provide an additional 41,805 sq. m (450,000 sq. ft.) of retail space to the existing market. Other construction in south Edmonton includes the $80 million Millwoods Hospital which is slated to be completed in 1988.

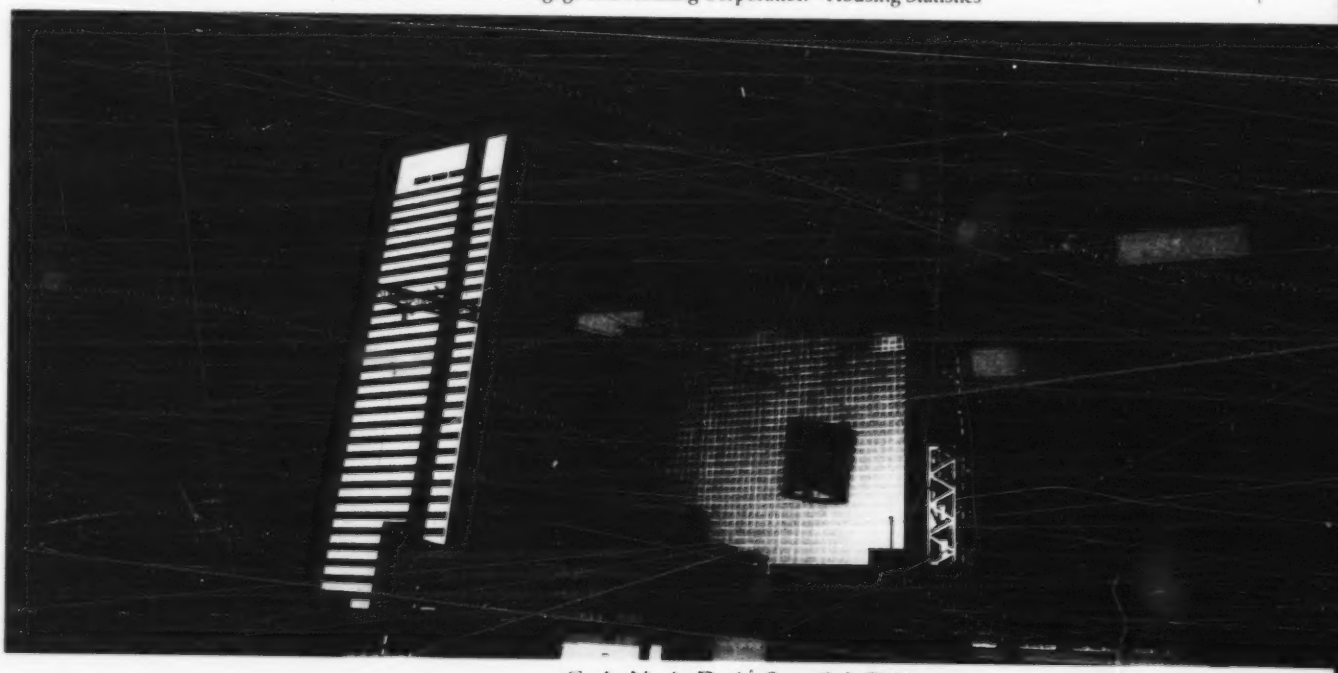
From an institutional perspective, construction continues on the $205 million federal goverment's Canada Place project and a $130 million addition to the city's light rail transit system.

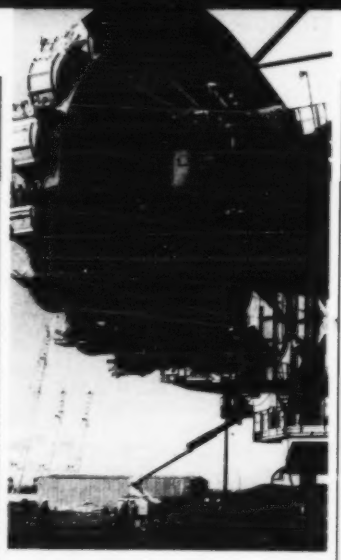
Table 3
Dwelling Starts & Completions 1982 – 1986

	Alberta		Metro Edmonton*		% Metro Edm. Starts	% Metro Edm. Compl.
Year	Starts	Compl.	Starts	Compl.	of Alberta	of Alberta
1982	26,789	31,364	10,420	11,095	38.9	35.4
1983	17,134	24,693	6,838	8,585	39.9	34.8
1984	7,295	12,057	2,770	4,750	38.0	39.4
1985	7,769	6,578	2,950	2,750	37.9	41.8
1986	7,369	8,022	2,611	2,614	35.4	32.6

* Edmonton Economic Development Authority estimates

Source: Canada Mortgage and Housing Corporation – Housing Statistics





Further development of Alberta's oil sands is taking place as world oil prices increase.

Table 4
A Sampling of Alberta's Industrial Projects

Sector	Company	Construction Period	Alta. Impact (in millions of 86$)
Oilsands	Syncrude	1983 - 1988	$ 805
	Suncor	1985 - 1990	535
	Home Oil et al	1985 - 1990	80
	Amoco/Chevron/Petro Canada	1985 - 1990	75
	Chieftain Development Co. Ltd.	1985 - 1990	50
	Shell Canada Ltd./Solv-Ex Corporation	1986 - *	270
	Syncrude	1988 - 1991	3,455
	Esso Resources Canada Ltd.	1990 - 2000	205
Refineries	Esso Resources Canada Ltd.	1990 - *	1,000
	Canadian Coal Liquefaction Corporation	1990 - *	105
Petrochemicals			
Polyethylene	Novacor Chemicals Ltd.	1986 - *	50
MTBE	Neste Oy/Celanese/Trans Mountain	1987 - 1987	255
Ethylene	Alberta Gas Ethylene Co. Ltd.	1988 - 1991	345
Pipelines	NOVA Corporation - Gathering System Expansion	1988 - 1989	520
	Arctic Oil	1991 - 1994	625
Forest Products	Hardwood Panel Plant - Drayton Valley	1985 - *	55
	Thermo-Mechanical Pulp Mill - Whitecourt	1986 - 1988	185
	Pulp Lumber Plant Expansion - Hinton	1987 - 1987	300
	Fine Paper Mill - Drayton Valley	1988 - *	195
Coal	Genesee Thermal Coal Mine	1983 - 1988	105
	Buffalo Hill Coal Mine	1990 - *	95
	Hinton Coal Mine	1993 - 1995	160
Metals	Magnesium Processing Plant - Aldersyde	1987 - 1993	325
Utilities, Transportation, Communications	Genesee Thermal Power Plant	1982 - 1991	1,455
	Light Rail Transit Expansion - Edmonton	1984 - 1991	130
	Rural Telephone Upgrading	1986 - 1991	450

* Completion date undetermined
Source: Alberta Economic Development and Trade - Electric Utility Planning Council - Informetrica Limited

Edmonton is the head office location of a number of major Canadian corporations.

CORPORATE

Office space absorption in 1986 provides evidence of the continuing corporate development occurring in the Metro Edmonton region.

Numerous private sector corporate offices are located in the city. As well, being the capital of the province, Edmonton is the location of most provincial and federal government offices and international consulates.

Over the past five years, Edmonton has experienced considerable corporate growth which is reflected in the city's skyline. Head office locations for construction, transportation, mining, energy, communications, utilities, distribution and food processing industries attest to the diversity of Edmonton's economy.

Table 5
Edmonton Central Business District Office Space 1982 – 1986
(square metres/ **square feet**)

Year	Completed	Supply (Inc. previous year's surplus)	Absorption	Cumulative Surplus	% Absorbed
1982	73,948	99,960	36,603	63,358	
	796,000	**1,076,000**	**394,000**	**682,000**	**36.6**
1983	184,778	248,136	87,698	160,438	
	1,989,000	**2,671,000**	**944,000**	**1,727,000**	**35.3**
1984	0	160,438	42,455	117,983	
	0	**1,727,000**	**457,000**	**1,270,000**	**26.5**
1985	41,805	159,788	82,681	77,107	
	450,000	**1,720,000**	**890,000**	**830,000**	**51.7**
1986	21,367	98,475	28,892	69,583	
	230,000	1,060,000	311,000	749,000	29.3

Source: Graeme Young & Associates, Alberta Real Estate - First Quarter, 1987

In 1986, the private sector accounted for 70% of Edmonton's office space absorption activity.

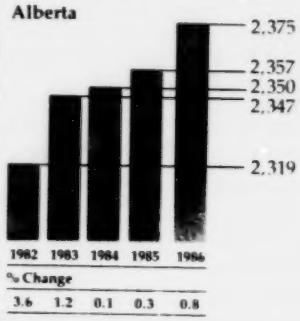
Table 6
Edmonton Suburban Office Space 1982 – 1986
(square metres/ **square feet**)

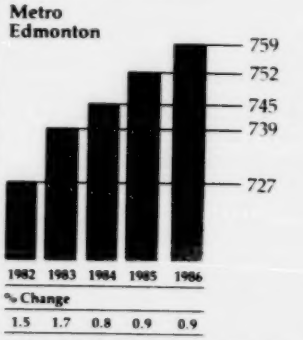
Year	Completed	Supply (Inc. previous year's surplus)	Absorption	Cumulative Surplus	% Absorbed
1982	75,156	133,033	69,861	63,172	
	809,000	**1,432,000**	**752,000**	**680,000**	**52.5**
1983	70,604	133,776	61,871	71,905	
	760,000	**1,440,000**	**666,000**	**774,000**	**46.3**
1984	5,295	77,200	20,903	56,297	
	57,000	**831,000**	**225,000**	**606,000**	**27.1**
1985	0	56,297	16,072	40,226	
	0	**606,000**	**173,000**	**433,000**	**28.5**
1986	6,503	46,729	16,165	30,564	
	70,000	503,000	174,000	329,000	34.6

Source: Graeme Young & Associates, Alberta Real Estate - First Quarter, 1987.

In 1986, 75% of Metro Edmonton's population was under the age of 45.

Graph 8
Population 1982 – 1986 as of June 1st
(thousands)





In 1986, Metro Edmonton accounted for 32% of Alberta's population.

Source:
Alberta Bureau of Statistics - Alberta Statistical Review
Edmonton Metropolitan Regional Planning Commission

POPULATION

As the strategic centre of extensive resource-based industries, Edmonton is one of Canada's most affluent and growing population centres. Metro population has increased at an average rate of 1.2% per year over the past five years.

In 1986, 75% of Metro Edmonton's population was under the age of 45, with 35% of the total population between 25 and 45 years of age.

Total personal income has been rising at an average annual rate of 6.4% over the past five years.

Total personal income in Edmonton totalled $13 billion in 1986. Edmonton's share of provincial personal income was 33% in 1986. Alberta's minimum wage is $3.80 per hour for persons over 18, $3.65 for persons under 18 and not attending school, and $3.30 for persons under 18 and attending school.

Table 7
Metro Edmonton
Population by Age & Sex – 1986*

Age	Male	% of Total	Female	% of Total	Sub Total	% of Total	Cumulative Total	% Cumulative
0-4	31,139	4.10	30,152	3.97	61,291	8.07	61,291	8.07
5-14	47,544	6.26	45,798	6.03	93,342	12.29	154,633	20.36
15-24	70,861	9.33	73,975	9.74	144,836	19.07	299,469	39.43
25-44	138,076	18.18	132,608	17.46	270,684	35.64	570,153	75.07
45-64	63,874	8.41	65,620	8.64	129,494	17.05	699,647	92.12
65 +	24,835	3.27	34,937	4.60	59,772	7.87	759,419	99.99
Total	376,329	49.55	383,090	50.44	759,419	99.99		

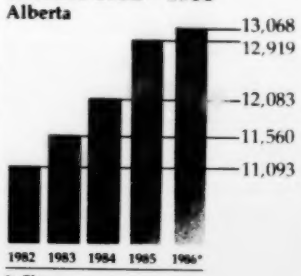
* Edmonton Economic Development Authority estimates
Above estimates based on 1986 Scenario 1 population projections from the City of Edmonton, Planning and Building Department.

Note: The 1986 estimate of total population for Metro Edmonton using 1986 Census of Canada data was 759,495.

Source: Edmonton Metropolitan Regional Planning Commission

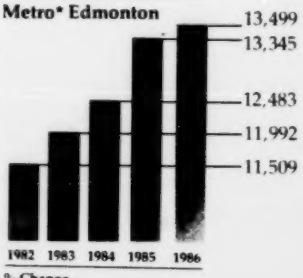
Graph 9
Per Capita Disposable Income 1982 – 1986

Alberta



% Change				
6.2	4.2	4.5	6.9	1.2

Metro* Edmonton



% Change				
7.1	4.2	4.1	6.9	1.2

* Edmonton Economic Development Authority estimates

Source:
Alberta Bureau of Statistics
- Alberta Economic Accounts
- Alberta Statistical Review

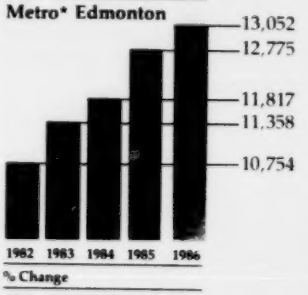
Edmonton Metropolitan Regional Planning Commission

Graph 10
Personal Income 1982 – 1986
($ millions)

Alberta

% Change				
13.3	5.2	3.8	7.4	2.0

Metro* Edmonton



% Change				
12.0	5.6	4.1	8.1	2.2

In 1986, Metro Edmonton accounted for 33% of Alberta's personal income.

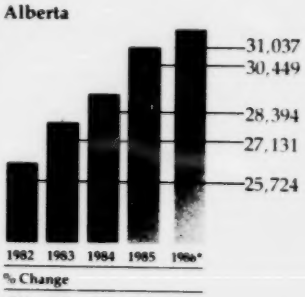
* Edmonton Economic Development Authority estimates

Source:
Alberta Bureau of Statistics
- Alberta Economic Accounts
- Alberta Statistical Review

Edmontonians' disposable income is among the highest in Canada.

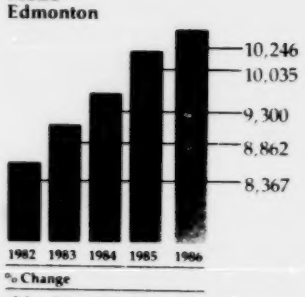
Graph 11
Personal Disposable Income 1982 – 1986
($ millions)

Alberta



% Change				
10.1	5.5	4.7	7.2	1.9

Metro* Edmonton



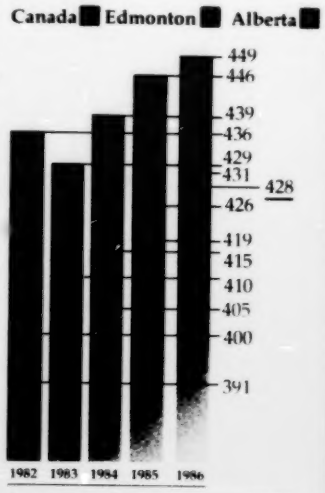
% Change				
8.8	5.9	4.9	7.9	2.1

In 1986, Metro Edmonton accounted for 33% of Alberta's personal disposable income.

* Edmonton Economic Development Authority estimates

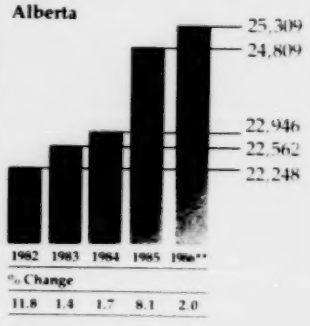
Source:
Alberta Bureau of Statistics
- Alberta Economic Accounts
- Alberta Statistical Review

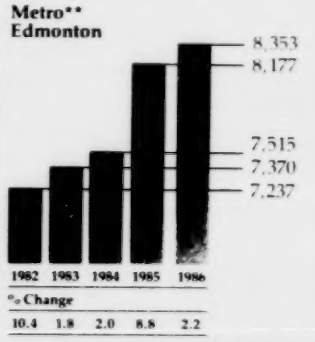
Graph 12
Average Weekly Earnings
1982 – 1986
Industrial Aggregate ($)



Source: Statistics Canada Catalogue #72-002
Note: Survey was substantially revised in April 1983.
More recent data is not comparable to that of previous years.

Graph 13
Wages and Salaries*
1982 – 1986
($ millions)





In 1986, Metro Edmonton accounted for 33% of Alberta's wages and salaries.

* Wages and salaries include supplementary labour income.
** Edmonton Economic Development Authority estimates.

Source:
Alberta Bureau of Statistics – Alberta Economic Accounts

LABOUR FORCE

Edmonton's labour force participation rate stands at 72%.

About 80% of Edmonton's population is 15 years of age or over, providing a potential labour force of more than 600,000 people. Almost 70% of this population total is between the ages of 15 and 44. This is reflected in an overall labour force participation rate of close to 72%.

Total Metro Edmonton wages and salaries exceeded $8.3 billion in 1986.

The University of Alberta, with an enrolment of more than 24,000 full-time students, is Canada's second largest university. It supports industry with faculties in all major disciplines at the undergraduate and graduate levels.

Edmonton plays a very significant role in the education and training of skilled labour. The Alberta Career Development and Employment department consults with employers in order to design special trades training programs at the Northern Alberta Institute of Technology (NAIT). NAIT is one of Canada's largest polytechnical institutes with 6,250 full-time students, 6,200 apprenticeship students, and another 28,600 registrants in the continuing education program. Alberta's newest technical institute, Westerra Institute of Technology, complements NAIT and has 2,600 students including 300 full-time, 700 apprenticeship and 1,600 part-time and correspondence students.

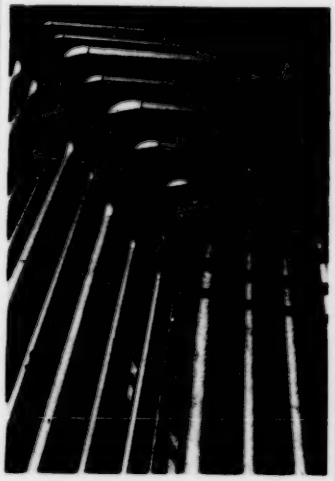
Table 8
Labour Force Participation & Unemployment Rates 1982 – 1986
(%)

Year	Participation Rate		Unemployment Rate	
	Alberta	Edmonton	Alberta	Edmonton
1982	70.8	72.0	7.5	8.0
1983	71.6	71.4	10.8	12.1
1984	72.1	72.9	11.2	14.1
1985	71.9	72.0	10.1	12.2
1986	72.1	71.6	9.8	11.5

Source: Statistics Canada – Catalogue #71-001

TRANSPORTATION

Edmonton is serviced by two major commercial airports, the Edmonton International and the Edmonton Municipal Airport.



Edmonton is the hub of western Canada's pipeline transportation system.

Road
Edmonton is strategically situated at the centre of several major highways. It is on the Yellowhead Interprovincial Highway between Winnipeg and Vancouver. Some of the largest trucking firms transporting freight to and from the Pacific coast have switched to the Yellowhead Route because of its low grades, favourable climatic conditions, and savings in fuel and time.

Provincial Highway #2 provides freeway access to central and southern Alberta, leading to the American border. Edmonton is the southern terminus for the Mackenzie Highway, the Alaska Highway, and highways serving heavy oil and tar sands operations to the north.

Air
Edmonton is served by two major commercial airports. The Edmonton International Airport, located south of the city, is a marshalling point for freight, goods and services on a global scale. Nine airlines provide scheduled services to all parts of North America and the world.

The Edmonton Municipal Airport, providing commuter passenger service and corporate aviation facilities, is located within the city itself, only minutes away from the central business district.

Other airport facilities in the Edmonton area include: Canadian Forces Base Edmonton, located at Namao; a training and recreational airport at Villeneuve and a float/ski airport at Cooking Lake.

Rail
Both Canadian National (CN) and Canadian Pacific (CP) Railways provide comprehensive rail service to the Edmonton region. CN's mainline passes through Edmonton while CP Rail routes freight between Edmonton and its mainline through Calgary.

Existing facilities of both railway systems are currently being expanded and upgraded. CN Rail has an ongoing yard expansion project at its Calder, Bissel and Clover Bar yards. CP Rail has built a new intermodal facility in south Edmonton. The provincial government has also established a container port facility in Edmonton.

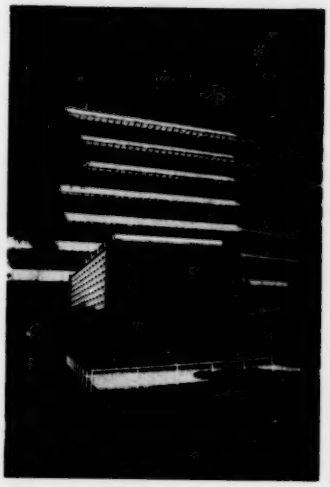
VIA Rail provides east and west rail passenger service through Edmonton.

Pipelines
Edmonton is the hub of western Canada's pipeline transportation system. Major oil refineries and petrochemical plants are served by numerous pipeline networks. The rapid development of oil exploration and production, including the Alberta oil sands, have kept pipeline construction active. Alberta's first synthetic crude oil pipeline from the Fort McMurray area terminates in Edmonton.

Water
Alberta's road, rail and air transportation systems give the city access to the Pacific and Arctic Oceans, Great Slave Lake and the Mackenzie River.

The Mackenzie River system is a major transportation corridor for the distribution of equipment and goods to communities in the Northwest Territories.

GOVERNMENT



Edmonton's City Hall is the seat of municipal government. The city is governed by an elected mayor and 12 aldermen.

Edmonton, being the provincial capital, is the location for most government services.

Edmonton is governed at the municipal level by an elected mayor and city council. The municipal government has jurisdiction over urban affairs such as city planning, transportation, police and fire protection. Revenue is provided by property and business taxes, provincial grants and City-owned utilities: telephones, power, sewer, water and sanitation.

The City has an AA credit rating and a yearly capital and operating budget approaching $1.6 billion.

The provincial government is headed by a premier with a cabinet chosen from among the elected members of the ruling party in the 79-seat legislative assembly.

The Province has legislative authority over municipal affairs, education, labour matters, social services, and property and civil rights within its borders.

Edmonton, the provincial capital, is the location of the Alberta Legislature and most of the government's central offices.

Alberta does not have a retail sales tax. Oil and gas revenues collected by the province have enabled the government to forego such a tax. A portion of resource revenues is also set aside in the Heritage Trust Fund – a $12.7 billion investment portfolio being preserved for the use of future generations. The provincial budget in 1986-87 was $10.8 billion.

Canada's federal government is led by a prime minister and a cabinet appointed from the ruling party elected in the 282-seat Parliament.

The federal government's responsibilities are related to interprovincial and international matters. Its revenue sources include personal and corporate income taxes, excise tax and resource taxes.

QUALITY OF LIFE

Fort Edmonton is a re-creation of the city's earlier years.

Edmonton's Capital City Recreation Park extends along the river valley for 16 km (10 miles), offering 55 km (33 miles) of hiking, biking and skiing trails.

History

Edmonton's history dates back to the late 1700's, when fur traders settled along the banks of the North Saskatchewan River where the city is now located. During the 1800's, Fort Edmonton changed from a fur trading centre to an agricultural community. In 1892, Edmonton was incorporated as a town. In 1898, it became the supply and transportation centre for prospectors trekking the overland route to the Klondike goldfields.

The town continued to grow and prosper as the gold rush was followed by the great land rush which swept across the prairies in the early 1900's. In 1904, Edmonton became a city and the following year was selected as the capital city for the new province of Alberta. The 1920's added another romantic chapter to Edmonton's history. Bush pilots based in the city became famous as pioneers in the aviation industry, establishing Edmonton as a centre for modern transportation and trade. Today, Canada's Aviation Hall of Fame is located in Edmonton.

The discovery of oil at nearby Leduc in 1947 ushered in a new industrial era which broadened Edmonton's economic base. The years that followed brought increased activities in mining, manufacturing, commercial ventures, construction and service industries. Today, Edmonton assumes an important role in western Canadian decision-making and the outlook for the future remains bright.

Climate

Edmonton has four distinct seasons. Summers are warm, with daytime temperatures averaging 22°C (72°F) and evening temperatures cooling to a pleasant 11°C (52°F). The warm months provide excellent weather for hiking, cycling, trail riding, golf, tennis and camping.

Winters are characterized by blue skies, low humidity and little wind. The coldest month is January, with the average high temperature being -11°C (12°F) and the average low being – 19°C (0°F). The average annual snowfall of 135 cm (53 in.), is appreciated by winter sport enthusiasts.

Canada's second largest university, the University of Alberta, is located in Edmonton.

Edmonton's $450 million Walter C. Mackenzie Health Sciences Centre provides patient care services as well as research and teaching facilities.

Education
Edmonton offers its residents excellent educational facilities with a broad choice of schooling for all needs. An open boundary policy and a variety of programs allow pupils and parents to select educational options in keeping with individual preferences. Special facilities include parochial schools as well as schools for the handicapped and for children with learning disabilities.

The University of Alberta, Canada's second largest university, has 18 faculties, including science, engineering, medicine and business, offering programs at the bachelors, masters and doctoral levels. Additional post-secondary institutions include: Concordia Lutheran College; The King's College; Northern Alberta Institute of Technology, offering 63 different programs; Westerra Institute of Technology; Athabasca University with unique correspondence degree programs; and Grant MacEwan Community College, with four city campuses.

Housing
Edmonton offers the finest in housing, ranging from single family dwellings and duplexes to apartments and condominium complexes.

Health Services
Edmonton's excellent health services include more than 4,000 adult beds in seven active-treatment hospitals served by approximately 1,300 medical doctors. A complete range of health services is also offered by the Local Board of Health through 20 regional health clinics.

The newest facility is the Walter C. Mackenzie Health Sciences Centre, a $450 million medical complex opened in 1982, providing patient care services as well as research and teaching facilities. Western Canada's first heart transplant operation took place at the Centre. The new $80 million Millwoods Hospital is scheduled to open in 1988.

Wayne Gretzky and the N.H.L. Stanley Cup champions, the Edmonton Oilers, entertain capacity hometown crowds at the Northlands Coliseum.

The nationally acclaimed Citadel Theatre is located in Edmonton.

Recreation

Edmonton has been declared a Green Survival City by the North American Association of Nurserymen. Capital City Recreation Park extends along the river valley for 16 km (10 miles), offering 55 km (33 miles) of hiking, biking and skiing trails. Along the river valley are numerous golf courses, boat launches and picnic sites.

Available for public use are numerous hockey rinks, golf courses, curling rinks, swimming centres and tennis facilities. A 61,000-seat stadium, a velodrome, an indoor fieldhouse, a shooting range and numerous picnic grounds are also available.

In addition to in-city facilities, Edmonton is close to Elk Island National Park and the famous Jasper and Banff National Parks are within easy driving distance. Within 160 km (100 miles) of Edmonton are more than 50 lakes available for recreational use.

Sports

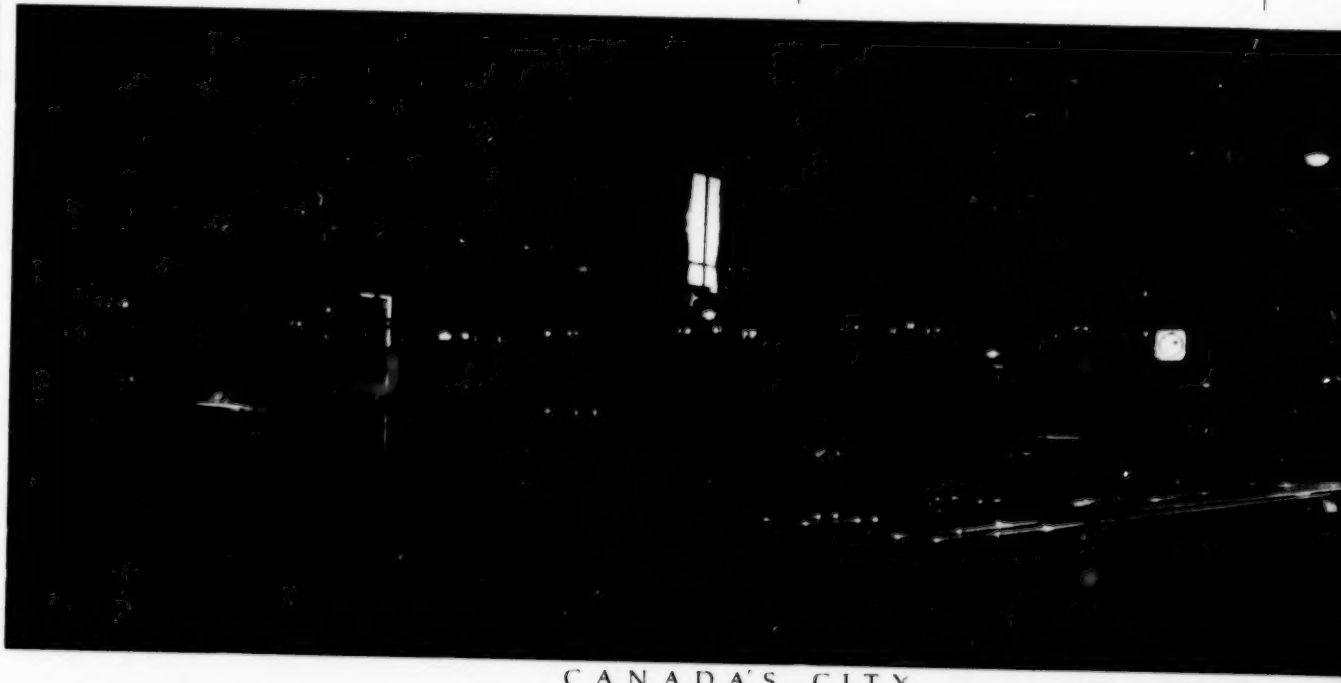
Edmonton has a multiplicity of sport and recreational participation programs. Its unique community league system, for example, ensures local residents every opportunity to become involved. In professional sports the city is home to the Edmonton Eskimos of the Canadian Football League, the Edmonton Oilers of the National Hockey League and the Trappers of the Pacific Coast Baseball League.

Culture

As Edmonton grows, so does its cultural and entertainment facilities. Live theatre companies in the city include the acclaimed Citadel. The Northern Alberta Jubilee Auditorium is home to the Alberta Ballet Company, the Edmonton Opera Association and the Edmonton Symphony. Edmonton's Northlands Coliseum, with a seating capacity of 18,000, is the site of major sports, cultural and entertainment productions.

There are numerous public and private museums and art galleries in the city. The Edmonton Public Library operates 13 community branches.

More than 300 restaurants offer a full range of dining experiences. Edmonton's night spots provide for every taste.



The Edmonton Convention Centre offers world-class convention facilities for delegations up to 5,000 people.

The world's largest indoor waterpark is located at West Edmonton Mall, which is also the world's largest retail and entertainment complex.

Shopping

Edmontonians enjoy climate-controlled shopping facilities in numerous malls throughout the metro area. In the downtown area, an ever-expanding system of underground and skywalk pedways links major shopping complexes, office buildings, hotels, and the underground stations of Edmonton's light rail transit system. The world's largest entertainment and retail complex, West Edmonton Mall, with over 800 stores under one roof is located in Edmonton.

Convention Facilities

Edmonton offers world-class convention facilities. The Edmonton Convention Centre, situated on the bank of the North Saskatchewan River, can accommodate delegations of up to 5,000 people. Trade fairs and exhibitions are also held in the Northlands AgriCom, western Canada's largest trade show complex. The city's many hotels provide accommodation at a broad range of prices.

City Celebrations

Edmontonians devote a lot of energy to recreation and entertainment. Numerous major celebrations are staged throughout the year.

In the latter half of July, Edmonton returns to the colourful era of the early gold rush days. Klondike Days provides residents and visitors a chance to pan for gold at the Chilkoot Mine, enjoy a midway, exhibition and all kinds of special entertainment.

The festivities are highlighted by the ''World Championship Sourdough Raft Race'', the King of Klondike competition, a Band Extravaganza and a complete dress-up party downtown.

Other celebrations include: Summerfest, a three-month series of entertainment events featuring performances in music, dance, theatre and visual arts; Jazz City, an international music festival which has gained world stature; the Fringe

Edmonton's Fringe Theatre Event is a multi-location theatre showcase that takes place each summer.

Edmonton is renown for its strong, vibrant arts and cultural community.

Theatre Event, a multi-location theatrical showcase and the Edmonton Folk Festival.

In winter, Edmonton holds the Snowflake Fantasy Festival which encompasses everything from ice sculptures to outdoor laser light shows.

No matter the season, Edmonton offers tourists and residents alike many opportunities to join in and celebrate Edmonton's vitality.

Media

Edmonton has four local TV stations. Two cable television companies supplement this service with local programming, specialty channels and programming from the major American networks. Pay TV is also available through the cable companies.

Edmonton's 18 radio stations span the entire spectrum of broadcasting formats.

Two daily newspapers are augmented by numerous ethnic and community weekly newspapers and a weekly news magazine.

Public Transportation

Edmonton has one of the most innovative transit systems in Canada, and in 1978 became the first city of its size in North America to have a light rail transit system. Handicapped citizens have their own door-to-door transportation system.

EDMONTON ECONOMIC DEVELOPMENT AUTHORITY

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